



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Petitioner Jennifer Young (Court Investigator)
 Conservator Gayle Libby

Petition for Transfer

			<p>GAYLE LIBBY, mother, was appointed Conservator of the Person on 7/29/2008.</p> <p>Court Investigator Jennifer Young filed a <i>Petition for Transfer</i> on 11/2/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Notes:</p> <ul style="list-style-type: none"> Pursuant to Probate Code § 2217(a), when an order has been made transferring venue to another county, the court transferring the matter shall set a hearing within 2 months to confirm receipt of the notification described in 2217(b). If <i>Petition</i> is granted, Court will set a Status Hearing on Wednesday, March 30, 2016, at 9:00 a.m. in Dept. 303 for confirmation of receipt of transfer.
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			<p>Reviewed by: LEG</p> <p>Reviewed on: 12/21/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1- Libby</p>	

**Status Hearing Re: Account/Report of Executor on Waiver of Account
and Petition for Distribution**

DOD: 01/17/11	DEBORAH KAMINE , daughter, was appointed Executor with full IAEA authority and without bond on 05/12/11. Letter Testamentary were issued on 05/12/11.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 11/10/2015: Counsel will file a petition to close the estate as directed by the Court; no appearance is necessary on 01/05/2016 if the petition is filed a least two court days prior.					
Cont. from 012414, 041814, 052314, 072214, 081914, 102814, 012715, 040715, 060915, 090815, 111015	Inventory & Appraisal, final, filed 10/11/13 - \$198,712.13	1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.					
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	<p>In the last status conference statement, the Executor reported that on approximately May 15, 2015, she received a letter from the State Controller advising that the claim for Dow Chemical stock, or cash equivalent, was approved. The letter further stated that the Claims Unit needed to research the history of the security in order to determine its value. The letter went on to state the process of researching the claim value can take up to 90 days, potentially up to 9 months for stock requiring more extensive research.</p> <p>In May of this year, the Claims Unit requested further information from the Executor regarding the processing of the claim. Mr. Franco provided that information, and had several communications with that Department to work out those issues. In July, the Claims Unit sent the Executor two checks, one for \$3.66 and the other for \$431.34, supposedly representing the value of the Dow stock. This was obviously wrong, for which Mr. Franco contacted the Claims Unit. On approximately 07/23/2015, Mr. Franco was finally able to straighten out the misunderstanding. The principal balance, approximately \$13,923 (\$51/share @ 273 shares) is still being researched by the Claims Unit, and the Executor continues to wait for that amount.</p> <p align="center"><u>Please see additional page</u></p>	<table border="1"> <tr><td>Reviewed by: LV</td></tr> <tr><td>Reviewed on: 12/22/2015</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 2 – Blankenship</td></tr> </table>	Reviewed by: LV	Reviewed on: 12/22/2015	Updates:	Recommendation:	File 2 – Blankenship
Reviewed by: LV							
Reviewed on: 12/22/2015							
Updates:							
Recommendation:							
File 2 – Blankenship							

In the meantime, in the attempt to bring a closure to the Estate now without waiting further, the Executor made offers to the other beneficiaries of the Estate to buy out their interest in the Estate. The offer was based upon the approximate beneficial value after payment of attorney's fees and costs and reimbursements to the Executor. Unfortunately, not all beneficiaries accepted the offer. As a result, Executor has now listed the real property in the Estate for sale with real estate broker Boyd Realty. It had previously been expected the real property would be able to be distributed in kind, making the need for sale unnecessary. However that position has changed since the offers to the beneficiaries have been rejected and the keeping of the house no longer desired. So the Estate will now be completely liquidated.

Petitioner would appreciate a further continuance of 60-90 days to allow time to receive the proceeds from the Dow Chemical Stock from the State of California, and to sell the real property. Once these two issues are resolved, the Estate will be in a position to close.

Status report filed 11/9/15 states the decedent's home has not sold. The property has been listed with Boyd Realty since just prior to the last status hearing. There have been no offers. The listing expiration date is approaching, and if the house has not sold, the executor will evaluate whether to relist with the current broker or change brokers. Petitioner would appreciate a further continuance of 60-90 days to allow time to continue trying to sell the house.

3 Vera Silberstein Primary Trust for Personal Care Case No. 11CEPR00298

Attorney Jeffrey A. Jaech (for Petitioners Betty Ann Bianchi and Robert W. Bianchi, Co-Trustees)

Sixth Account and Report of Co-Trustees upon Conservatee's Death, and Petition for Its Settlement, Excusing Further Court Accountings, for Discharge of Bond, and for Allowance of Attorneys' Fees

DOD: 9/19/2015		<p>BETTY ANN BIANCHI and ROBERT W. BIANCHI, Co-Trustees, are Petitioners.</p> <p>Account period: 1/1/2015 – 9/30/2015</p> <p>Accounting - \$113,758.16 Beginning POH - \$ 99,976.02 Ending POH - \$ 70,237.16 (all cash)</p> <p>Co-Trustees - waive</p> <p>Attorney - \$960.00 <i>(per itemization and declaration; 6.40 paralegal hours @150/hr.; to be paid from the Conservators' Trust;)</i></p> <p>Costs - \$435.00 <i>(filing fee)</i></p> <p>Receivables - \$1,500.00 <i>(reimbursement from Conservators' Trust estate due to payment by Primary Trust estate of Court-authorized attorney fees;)</i></p> <p>Current bond - \$145,000.00 <i>(should be discharged)</i></p> <p>Petitioners state that on the death of Vera Silberstein, the Trust terms state that the remaining Trust estate shall be distributed to the Trustees; Petitioners have distributed the residue of the Trust estate to themselves as Co-Trustees of the Conservators' Trust; therefore, no bond is needed and the bond should be discharged.</p> <p>Petitioners pray for an Order that:</p> <ol style="list-style-type: none"> 1. The Sixth Account of the Co-Trustees be approved, allowed and settled as filed; 2. Petitioners be authorized and directed to pay the attorney \$960.00 in fees, and costs of \$435.00, <i>[to be paid from the Vera Silberstein Conservators' Trust];</i> 3. That Petitioners need not file any further Court accountings; and 4. The bond be discharged as no longer required. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 4 is the related Vera Silberstein Conservators' Trust.</p>
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Reviewed by: LEG

Reviewed on: 12/21/15

Updates:

Recommendation:

File 3 - Silberstein

Attorney Jeffrey A. Jaech (for Petitioners Betty Ann Bianchi and Robert W. Bianchi, Co-Trustees)

**Sixth Account and Report of Co-Trustees upon Conservatee's Death,
and Petition for Its Settlement, Excusing Further Court Accountings, for
Discharge of Bond, and for Allowance of Attorneys' Fees**

DOD: 9/19/2015		BETTY ANN BIANCHI and ROBERT W. BIANCHI Co-Trustees, are Petitioners. Account period: 1/1/2015 – 9/30/2015 Accounting - \$2,623,417.27 Beginning POH - \$2,623,417.27 Ending POH - \$2,623,243.33 (\$5,387.40 cash) Co-Trustees - waive Attorney - \$4,734.00 <i>(per itemization and declaration, for services from 3/11/15 to 9/19/15; for 7.2 attorney hours @ \$395.00/hr and 12.60 paralegal hours @150/hr;)</i> Costs - \$435.00 (filing fee) Current bond - \$85,000.00 <i>(Petitioner requests the further requirement of bond be waived; Waiver of Accounting by Co-Trustees and Waiver of Bond Requirement filed 11/2/2015 by beneficiaries;)</i> Petitioners state the Conservators' Trust estate has very little cash to pay its bills and obligations because of the costs of improvements made to the Tahoe property <i>(please refer to Third Account)</i> ; as a result, the Conservatee's family has loaned additional funds to the Trust estate during past accounting periods; recently, Petitioners' family members have built a new cabin on the Tahoe property at their own expense. Petitioners pray for an Order that: 5. The Sixth account of the Co-Trustees be approved, allowed and settled as filed; 6. Petitioners be authorized and directed to pay the attorney \$4,734.00 for services and costs advanced of \$435.00 , plus \$1,395.00 for fees and costs relating to the Silverstein Trust for Personal Care (totaling \$6,564.00), <i>[to be paid from the Vera Silberstein Conservators' Trust]</i> ; 7. That Petitioners need not file any further Court accountings; and 8. The bond be discharged as no longer required.	NEEDS/PROBLEMS/COMMENTS:
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Reviewed by: LEG

Reviewed on:
12/21/15

Updates:

Recommendation:

File 4 - Silberstein

Attorney Gary G. Bagdasarian (for Petitioner Christina Castillo, Guardian)

**Second Account and Report of Guardian; Petition for Compensation of
Guardian of the Person and for Attorney's Fees and Cost Reimbursement to the
Attorney**

		<p>CHRISTINA CASTILLO, maternal aunt and Guardian of the Person and Estate appointed on 8/20/2012, is Petitioner.</p> <p align="center"><i>~Please see Petition for details~</i></p> <p>Declaration of [Petitioner] Christina Castillo in Support of Request for Compensation as Guardian of the Person and Estate filed 12/14/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Page 6</u> is the related Guardianship Estate of sibling, Joseph D. Galvan, 12CEPR00684.</p> <p>Note: Court will set a status hearing as follows:</p> <ul style="list-style-type: none"> Wednesday, December 13, 2017, at 9:00 a.m. in Dept. 303 for the filing of the third account. <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.</p>	
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		<p>Reviewed by: LEG</p> <p>Reviewed on: 12/21/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5- Galvan</p>		

Attorney Gary G. Bagdasarian (for Petitioner Christina Castillo, Guardian)

**Second Account and Report of Guardian; Petition for Compensation of
Guardian of the Person and for Attorney's Fees and Cost Reimbursement to the
Attorney**

		<p>CHRISTINA CASTILLO, maternal aunt and Guardian of the Person and Estate appointed on 8/20/2012, is Petitioner.</p> <p align="center"><i>~Please see Petition for details~</i></p> <p>Declaration of [Petitioner] Christina Castillo in Support of Request for Compensation as Guardian of the Person and Estate filed 12/14/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Page 5</u> is the related Guardianship Estate of sibling, Daniel J. Galvan III, 12CEPR00683.</p> <p>Note: Court will set a status hearing as follows:</p> <ul style="list-style-type: none"> Wednesday, December 13, 2017, at 9:00 a.m. in Dept. 303 for the filing of the third account. <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.</p>	
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		<p>Reviewed by: LEG</p> <p>Reviewed on: 12/21/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6 - J. Galvan</p>		

**Second Amended Account Current and Report of Conservator; Petition of Conservator
Petition for its Settlement, for Allowance of Attorneys Compensation and for its Termination**

		DEBRA PASLEY , Mother and Conservator of the Person and Estate with bond of \$15,000.00, is Petitioner. <i>(Not verified.)</i>	NEEDS/PROBLEMS/COMMENTS:
		Account period: 3/28/13 – 10/17/14	Minute Order 12/1/15: Counsel represents that his client just provided all of the documents necessary for the accounting; needs 30 days for completion. No appearance is necessary on 1/5/16 if the petition is filed at least 2 court days prior.
Cont. from 042315, 060215, 081815, 091515, 102015, 120115		Accounting: <u>Not provided</u>	Note: A Substitution of Attorney has not been filed; therefore, Mara M. Erlach remains attorney of record. <u>SEE ADDITIONAL PAGES</u>
Aff.Sub.Wit.		Beginning POH: \$13,438.31	
Verified		Ending POH: \$70,195.61	
✓ Inventory		(\$1,715.61 plus a 1/5 interest in real property in Virginia valued at \$68,480.00)	
PTC		Petitioner states: Inventory and Appraisal was filed 6/5/13 showing the value of the estate to be \$13,438.31. Summary of account and supporting schedules are provided at Exhibit B. (See #1.)	
Not.Cred.		As reflected in prior pleadings, the Conservator and Conservatee moved out of state. The Conservator was appointed Guardian of the Conservatee in Oklahoma by Court order and Letters issued on 8/13/14.	
Notice of Hrg			
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Pers.Serv.		Petitioner does not request compensation for her services.	
Conf. Screen			
✓ Letters 3/28/13			
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Video Receipt		Petitioner requests attorney's compensation as set forth in Exhibit "C." (See #3.)	
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Status Rpt		Petitioner prays: 1. That this account and report be approved and settled; 2. That the acts of the Conservator shown in the account and report be approved; 3. That, upon settlement of this account, the Conservator be directed to pay her attorneys, McCormick Barstow, LLP, compensation for services rendered and, as yet, unpaid; 4. That the Conservatorship in California be terminated; and 5. That the Court grant such other and further relief as it deems just and proper.	
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: skc
			Reviewed on: 12/22/15
			Updates:
			Recommendation:
			File 7 – Pasley

Page 2 – NEEDS/PROBLEMS/COMMENTS:

1. This petition does not provide any accounting in the form required by Probate Code §§ 2620, 1060, or any mandatory schedules on the required Judicial Council forms.

Need amended petition with accounting, schedules, including required mandatory form for summary. Although Petitioner has been appointed Guardian in Oklahoma, this Court retains jurisdiction for settling accounts pursuant to Probate Code §2630.

The only schedule provided at Exhibit B is a statement of property on hand, labeled as “receipts,” but which does not show any account summary, receipts, disbursements, etc., and further indicates that the conservatorship estate cash has been reduced by \$11,722.70 without explanation.

Note: The Conservatee’s interest in the Virginia real property is not an asset of this conservatorship estate, but should be referenced in its own schedule pursuant to §1063(h).

2. This petition is not verified by the Conservator as required by Probate Code §§ 1021, 1023.
(Note: §1023 provides that an attorney may sign or verify on a client’s behalf if he or she is absent from the county unless the person is a fiduciary appointing in the proceeding.)
3. Petitioner requests attorney’s compensation pursuant to Exhibit C, but no Exhibit C is attached.
4. Need Notice of Hearing.
5. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §1460(b)(6) on:
 - Morgan Elizabeth Pasley (Conservatee)
 - Debra Pasley (Conservator/Fiduciary, since the petition is not verified by her)
 - David Hal Jones (Father)
6. *The Court may also require notice to the surety of any continued or future hearings.*

Atty Hinshaw, Caroline K. (for Mark Reiff – Executor – Petitioner)
 Atty Teixeira, J. Stanley (for Scott Raven – Objector)

Probate Status Hearing

DOD: 3/29/13	<p>MARK REIFF, Executor with Full IAEA and bond of \$2,100,000.00, filed a Petition for Instructions on 12/22/14 with regard to the sale of the estate's interest in real property.</p> <p>SCOTT RAVEN, an interested person (buyer), filed an Objection on 2/23/15.</p> <p>Status Report of Attorney Caroline Hinshaw filed on 10/6/15 states a formal written agreement has been fully executed. The parties have cooperated to sign documents to close escrow for the sale of the Estate's interest in real property. Anticipated close of escrow is before October 13, 2015. Ms. Hinshaw anticipates the prompt filing of a petition for preliminary distribution of a substantial portion of the estate.</p> <p>Status Report of J. Stanley Teixeira filed on 10/8/15 states he is happy to report that the purchase of the real property by his client has been completed. Escrow closed on 10/6/15.</p> <p>Therefore, at the continued hearing on 10/13/15, the Court set this status hearing.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The Order Settling Executor's First Account entered 12/8/14 authorized continuation of the administration for up to one year. <u>A status hearing is set for 1/11/16 re the filing of the Second/Final Account.</u></p> <ol style="list-style-type: none"> 1. Need status re Executor's Petition for Instructions. 2. In the interest of efficiency, the following is also noted in advance of the 1/11/16 status hearing: Need Second/Final Account or written status report pursuant to Local Rule 7.5.
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	<p>Reviewed by: skc</p> <p>Reviewed on: 12/22/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8- Carlson</p>	

First and Final Account and Report of Status of Administration of Administrator and Petition for Settlement Thereof; for Waiver of Statutory Administrator's Compensation and Statutory Attorney's Fees; and for Final Distribution

DOD: 08/14/11		WALID TAREB , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner states at paragraph 15 that no assets remain in the estate; however, the accounting shows that the property on hand is \$85,000.00 (consisting of real property) and the prayer requests court authorization to abandon the real property. Need clarification. Has the property been foreclosed? If the property is still an asset of the estate, the Court may need more information and/or authority regarding closing an estate while there is still an asset to be disposed of. 2. It is noted that several of the heirs were mailed notice at the address of the real property asset of the estate. The Court may require more information regarding whether they all have been living at the residence since the date of death. There are no receipts showing that rent has been paid to the estate. 3. Need Allowance or Rejection of Creditor's Claim for claim of the State Board of Equalization. 4. Rejection of Creditor's Claim of the Franchise Tax Board was filed 12/16/15 and indicates that a copy of the Rejection was mailed to the FTB on 12/11/15. Pursuant to Probate Code § 9250, the Creditor has 90 days to respond.
		Account period: 07/03/13 – 09/30/15	
		Accounting: \$85,000.00	
		Beginning POH: \$85,000.00	
		Ending POH: \$85,000.00	
Cont. from		Administrator: waived	
<input type="checkbox"/>	Aff.Sub.Wit.	Attorney: waived	
<input checked="" type="checkbox"/>	Verified	Petitioner states that the sole asset of the estate is real property that was appraised at \$85,000.00 and is subject to a loan in favor of Wells Fargo Bank in excess of \$130,000.00 as of 07/13/13 and therefore there is no equity in the property. Wells Fargo commenced foreclosure on the property which was continued several times over the past two years in order to attempt to modify the loan, which was unsuccessful. Consequently, there remain no assets in the estate and the estate is insolvent. Creditor's claims were filed in the estate as follows: Franchise Tax Board: \$1,363.92 State Board of Equalization: \$6,067.41 Declaration of Gary Bagdasarian filed 11/23/15 states that the current market value of the residence is approximately \$153,155.00 - \$160,323.00 and the current outstanding balance of the mortgage is \$169,449.46.	
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Reviewed by: JF Reviewed on: 12/21/15 Updates: Recommendation: File 9- Tareb			

Petition to Fix Residence Outside the State of California

		<p>PAEK LEE, Mother and Conservator, is Petitioner.</p> <p>Petitioner was appointed Conservator of the Person on 9/25/13.</p> <p>Petitioner requests the Court authorize that the residence of the Conservatee be fixed outside the State of California to Dover, Delaware (address provided in petition).</p> <p>Petitioner states they are originally from Delaware and she has friends and family who can help her with her son. There are better daycare programs for him, along with physicians that can treat him. He will also be enrolled in a better school. He will be eligible for a private nurse to assist on a daily basis.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Probate Code §2352 requires that the Conservator commence a conservatorship or equivalent proceeding in the new state.</p> <p>Therefore, if granted, the Court will set a status hearing for the establishment of a conservatorship or equivalent in Delaware as follows:</p> <ul style="list-style-type: none"> Monday, April 5, 2016 at 9:00 am in Dept. 303 <p>If proof is filed that a conservatorship or equivalent in Delaware has been established, the matter may be taken off calendar. Alternatively, a written status report is required pursuant to Local Rule 7.5, and appearance will be necessary (either personally or by CourtCall).</p>
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Reviewed by: skc
Reviewed on: 12/22/15
Updates:
Recommendation:
File 10- Smith

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr., Beneficiary)
 Attorney Jennifer Walters (for Walter A. Morris, Successor Trustee)

Petition to Compel Accounting by Trustee of the Gary F. Morris, Sr. 2013 Trust and Petition for Distribution of Trust Assets to Doug Standing, Trustee of the Gary Morris, Jr. Trust and Petition for Fees and Costs

DOD: 10/19/2013	GARY MORRIS, JR., Beneficiary, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: Page 11B is a Fee Waiver Review. Continued from 10/6/2015. Minute Order states Ms. Walters represents that she is nearing completion of the account; requests additional time.
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<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	<input type="checkbox"/> W	<input type="checkbox"/> /	
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/S			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

Petitioner states:

- WALTER A. MORRIS** was appointed as Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** on 4/1/2014 [copy of Trust attached as Exhibit A to Declaration of Clerical Error and Omissions filed 10/2/2015];
- The **GARY F. MORRIS, SR., 2013 TRUST** terms provide that the balance of the Trust estate, including all assets poured into the Trust as a result of Trustor's death, is to be distributed to **BARBARA TURNER**, Trustee of the **GARY F. MORRIS, JR., TRUST**;
- BARBARA TURNER** resigned as Trustee of both Trusts, and **WALTER A. MORRIS** was appointed as Successor Trustee;
- Petitioner requests the Court compel **WALTER A. MORRIS**, as Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**, to distribute the remaining assets in the **GARY F. MORRIS, SR., 2013 TRUST** to **DOUG STANDING**, Trustee of the **GARY F. MORRIS, JR., TRUST** within 30 days of the order approving this petition;
- GARY F. MORRIS, SR., 2013 TRUST** terms provide that the Trustee shall periodically, but not less than once each year, render an account of its administration of the Trust(s) under the Trust instrument to all current income beneficiaries;
- GARY F. MORRIS, SR's.**, date of death is 10/9/2013 [sic]; **WALTER A. MORRIS** was appointed as Successor Trustee on 4/1/2014; to date, no accounting has been received from **WALTER A. MORRIS**.

~Please see additional page~

Reviewed by: LEG
Reviewed on: 12/21/15
Updates:
Recommendation:
File 11A – Morris

Petitioner prays the Court Order:

1. An accounting from **WALTER A. MORRIS** from the period when he was Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** from 4/1/2014 until 8/31/2015;
2. **WALTER A. MORRIS**, Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**, [shall] distribute all of the remaining assets in the **GARY F. MORRIS, SR., 2013 TRUST** to **DOUG STANDING**, Trustee of the **GARY F. MORRIS, JR., TRUST** within 30 days of the signed of the order approving this *Petition*;
and
3. Allowing attorney fees and costs to Petitioner to be paid by Walter Morris for failure to file accounting and distribute assets pursuant to **GARY F. MORRIS, SR., 2013 TRUST** terms.

Notes:

- *Petition* was filed using a fee waiver, which is currently pending. The **\$435.00** filing fee is appropriately payable from Trust assets. *Declaration of Clerical Error and Omissions* filed 10/2/2015 states Petitioner agrees that a filing fee should be paid by Walter Morris, Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**; however, Walter Morris is not communicating with the beneficiary, Gary Morris, Jr., his attorney, nor the Successor Trustee of the **GARY F. MORRIS, JR., TRUST**; the beneficiary has no access to funds of the Trust.
- *Order Setting Bond Amount* filed 4/25/2015 set bond at **\$286,000.00**, proof of which was filed on 5/9/2014. *Order Reducing Bond Amount* filed 5/13/2015 finds that the bond amount for **WALTER A. MORRIS**, as Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** is reduced to **\$152,137.88**, which is the amount of net proceeds [distributed to the seller of the Trust real property] plus 10%.
- *Declaration of Clerical Error and Omissions* filed 10/2/2015 attaches as *Exhibit B* a copy of the bond renewal that was mailed to Walter Morris, and states it is unknown what Walter Morris did with it.

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr.)

Fee Waiver Review - Confidential

DOD: 10/19/2013		NEEDS/PROBLEMS/COMMENTS:
Cont. from 100615, 111715		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 12/21/15
		Updates:
		Recommendation:
		File 11B – Morris

11B

Final Account and Report of Administrator and Petition for Its Settlement, and Petition for Final Distribution, and for Allowance of Compensation to Administrator and Attorneys for Ordinary Services

DOD: 4/3/14		<p>BRITTNEY MARIE LANE, Administrator With Full IAEA without bond, is Petitioner.</p> <p>Account period: 4/3/14 – 9/11/15 Accounting: \$294,164.09 Beginning POH: \$284,806.04 Ending POH: \$ 64,856.52 (\$9,913.54 cash, a \$1,718.00 expected 2013 IRS Tax Refund, a Promissory Note valued at \$43,224.98, and a vehicle valued at \$10,000.00.)</p> <p>Administrator (Statutory): \$8,883.28. Petitioner and her brother have agreed that Petitioner will receive the vehicle valued at \$10,000.00 as a distribution. Petitioner requests that this distribution be applied as payment of Petitioner's compensation, which will result in an overpayment of \$1,116.72, which Petitioner will reimburse to the estate.</p> <p>Attorney (Statutory): \$8,883.28</p> <p>Attorney Costs: \$1,695.00 (filing fees, certified copies, publication, appraisal, copies of creditor's claims, and delivery fee)</p> <p>Administrator costs: Not stated Due to a lack of cash in the estate, Petitioner has paid expenses and costs of administration out of her own pocket. Her brother, the other beneficiary, has reimbursed her for one-half of the funds advanced. Petitioner states she makes no claim for reimbursement from the estate.</p> <p>Petitioner states the real property was sold pursuant to Notice of Proposed Action to William V. Jensen for \$270,000.00, which sale included satisfaction of the Creditor's Claim filed by Mr. Jensen for \$112,606.35. The estate received a promissory note from Mr. Jensen in the amount of \$43,224.87 at 3.875% payable in 60 equal monthly installments.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>SEE ADDITIONAL PAGES</u></p>	
Cont'd from 110315				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	PTC			
<input checked="" type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input checked="" type="checkbox"/>	FTB Notice			

Reviewed by: skc
Reviewed on: 12/22/15
Updates:
Recommendation:
File 12 - Lane

Page 2

Petitioner requests this Court to order:

1. That administration of this estate be brought to a close;
2. The first and final account of Petitioner as Administrator be settled, allowed, and approved as filed;
3. That all acts and proceedings of Petitioner as Administrator be confirmed and approved;
4. That Petitioner be ordered to contribute cash to the estate of \$1,116.72 (for distribution of vehicle as in-kind statutory compensation);
5. That Petitioner be ordered to pay the sum of \$9,913.54 to Gilmore Magness Leifer, a Professional Corporation (\$8,883.28 as compensation for ordinary legal services to Petitioner and to the estate and \$1,695.00 to reimburse for costs advanced on behalf of Petitioner and the Estate);
6. That BRANDON MICHAEL KENNETH LANE and BRITTNEY MARIE LANE be ordered to each pay one-half of the fees for the preparation of the final fiduciary tax returns and income taxes, if any, owed;
7. That Petitioner be ordered to distribute the assets of the estate as follows:

Brittney Marie Lane: \$225.99 cash plus the vehicle, a one-half interest in the promissory note, and a one-half interest in the 2013 tax refund

Brandon Michael Kenneth Lane: \$225.99 cash plus a one-half interest in the in the promissory note, and a one-half interest in the 2013 tax refund

8. That final distribution of the decedent's estate in Petitioner's hands and any other property of the decedent or the estate not now known or discovered be distributed as set forth in the Petition;
9. That should any property of the decedent or the estate not now known or discovered become known or discovered, such property be distributed one-half to BRITTNEY MARIE LANE and one-half to BRANDON MICHAEL KENNETH LANE; and
10. That any further orders be made as the Court considers proper.

SEE ADDITIONAL PAGES

Page 3 – NEEDS/PROBLEMS/COMMENTS:

1. Need clarification regarding the sale transaction of the real property. Petitioner states the real property was sold for the appraised value, \$270,000.00 by including satisfaction of the creditor's claim of \$112,606.35 previously filed by the buyer, and apparently by the estate carrying a note of \$43,224.98 at 3.875% for 60 months for the buyer.

- First, need clarification with reference to Probate Code §9920, which requires Court authorization for exchange of property for other property (in this case, exchanging the estate's real property for a promissory note).

- Second, need clarification as to how the sale price is calculated at \$270,000.00, when the total of the creditor's claim of \$112,606.35 plus the note of \$43,224.98 equals \$155,831.33. This appears to actually be \$114,168.67 loss to the estate. Note: This affects statutory compensation calculation.
2. Calculation of the statutory compensation also includes receipts such as escrow refunds and a payment on the above-referenced promissory note. The Court may require clarification and/or authority for use of these items as receipts for purposes of statutory compensation calculation.
3. Attorney Costs appear to include items considered by the Court to be costs of doing business and not reimbursable, including copies (\$38.00) and delivery fee (\$45.00). Need clarification per Local Rule 7.17. The Court may reduce the costs by \$83.00 to \$1,612.00.
4. Petitioner states unspecified expenses of administration were paid out of pocket, and half was reimbursed to her by the other heir. However, Petitioner does not state what the expenses were or what the total was. Need clarification with reference to Local Rule 7.17.
5. Petitioner requests that the Court order heir Brandon Lane to pay one-half of the fees for preparation of the final fiduciary tax returns and income taxes, if any, after distribution. Need authority for this order, or consent from Mr. Lane for this receipt of this liability.
6. Need written consent of Brandon Lane for receipt of the promissory note and expected tax refund in undivided interests pursuant to Local Rule 7.12.3.

First and Final Account of Administrator and Petition for Its Settlement, for Allowance of Compensation for Ordinary and Extraordinary Services for Administrator and Attorney and for Final Distribution

DOD: 4/6/07		ELISA T. SIMPSON , Administrator with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. The petition does not state the account period pursuant to Probate Code §1061. Need clarification. 2. The house was valued at \$140,000.00 at the decedent's death in 2007, and the Reappraisal for Sale filed 9/14/15, indicates a more recent value of \$75,000.00. Petitioner states due to the poor condition of the property, the house was sold for \$40,000.00. Given the substantial loss to the estate, the Court may require further information regarding the house. Was it occupied between 2007 and 2015? What was the reason for the \$35,000.00 difference between the Reappraisal value and the sale value? 3. One of the escrow items paid when the house was sold was a bail bond lien in the amount of \$6,116.50. Given that the decedent died in 2007 and administration was not opened until 2014, the Court may require clarification regarding the origin of this lien. 4. Need Notice of Hearing. 5. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on all heirs pursuant to Probate Code §11000. 6. Need order. Local Rule 7.1.1.F.
Cont. from		Account period: Not stated	
	Aff.Sub.Wit.	Accounting: \$140,000.00	
✓	Verified	Beginning POH: \$140,000.00	
✓	Inventory	Ending POH: \$ 30,554.14 (cash)	
✓	PTC	Administrator (Statutory): Waived	
✓	Not.Cred.		
	Notice of Hrg	x Attorney (Statutory): \$1,600.00	
	Aff.Mail	x Attorney (Extraordinary): \$1,375.00	
	Aff.Pub.	(for 5 attorney hours @ \$275/hr in connection with the sale of the real property, as described in Attorney Ramirez' Declaration attached to this petition)	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
	Duties/Supp	Closing: \$800.00	
	Objections	Distribution pursuant to intestate succession:	
	Video Receipt		
	CI Report	Aurelio Tristan: \$3,397.39	
✓	9202	Manuel Tristan: \$3,397.39	
	Order	x Antonio Tristan, Jr.: \$3,397.39	
		Rebecca T. Sanchez: \$3,397.39	
		Maria T. Ramirez: \$3,397.39	
	Aff. Posting	Josie Moreno: \$3,397.39	
	Status Rpt	Raul Tristan: \$3,397.39	
	UCCJEA	Elisa T. Simpson: \$3,397.39	
	Citation		
✓	FTB Notice		
			Reviewed by: skc
			Reviewed on: 12/22/15
			Updates:
			Recommendation:
			File 13- Escobar

Report of Sale and Petition for Order Confirming Sale of Real Property

DOD: 12/4/14		JOHN PARKER is Executor/petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 11/17/15. As of 12/18/15 the following issues remain: 1. #3a of the petition indicates the property was appraised at \$280,000.00 however the inventory and appraisal filed on 6/4/15 lists the value of the property at \$350,000.00. Need reappraisal for sale. 2. Probate Code § 10309(a)(3) requires the sales price to be within 90% of the appraised value of the property. 3. Need proof of service of the Notice of Hearing on the purchasers Steven and Julia McShea pursuant to Probate Code § 10308(c). 4. Need proof of service of the Notice of Hearing along with a copy of the petition on John F. Garland pursuant to the Request for Special Notice filed on 6/26/15.
		Sale price - \$260,000.00 Overbid - 273,500.00	
Cont. from 111715		Appraisal - \$350,000.00 Property - 21258 Auberry Rd. Clovis	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Buyers - Steven and Julia McShea TTEE of the SJM Family Trust.	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input checked="" type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Broker - \$15,600.00 (6% - payable to Kevin Christiansen)			
Reviewed by: KT			
Reviewed on: 12/18/15			
Updates:			
Recommendation:			
File 14 – Stocchetti			

**First Amended Waiver of Account and Report of Status of Administration of Estate, and
Petition for Settlement Thereof; for Allowance of Statutory Executor's Commissions and
Attorney's Fees and Extraordinary Attorney's Fees; and for Final Distribution**

DOD: 11/17/12		JANIS G. HOWARD , Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need acceptance of trust by Tammy Juarez pursuant to Probate Code §§ 10954(a)(4), 15600. 2. Need revised order with the following modifications: a. The decedent's will directs that a testamentary trust be established for the benefit of Ms. Vest; therefore, the Order should establish and set forth the terms of the testamentary trust for Ms. Vest's share. b. The order should comply with Local Rule 7.6.1.F. Some portion of the contents of the order must appear on the page upon with the judge's signature is affixed.
		Accounting is waived	
		I&A: \$85,300.00	
<input type="checkbox"/>	Aff.Sub.Wit.	POH: \$30,950.86 cash plus residential real property located on Clay Ave., in Fresno and misc. personal property	
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC	Executor (Statutory): \$3,652.00	
<input checked="" type="checkbox"/>	Not.Cred.	Attorney (Statutory): \$3,652.00	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney (Extraordinary): \$2,255.00 (for 8.2 hours @ \$275/hr for legal services in connection with the sale of the real property and the negotiation of the mortgage payoff of the real property on hand)	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Costs: \$1,412.30 (filing, publication, recording, appraisal)	
<input checked="" type="checkbox"/>	Letters	Closing Reserve: \$1,079.56	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	Petitioner states the personal property will be distributed pursuant to agreement without concern to the court.	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202	Distribution pursuant to the terms of the decedent's will and assignments and agreements filed:	
<input checked="" type="checkbox"/>	Order	Janis G. Howard: \$7,087.50 plus an undivided 37.5% interest in the real property	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice	Verita Vernice Smith: \$7,087.50 plus an undivided 37.5% interest in the real property Tammy Juarez, in trust for the benefit of Jennifer Lynn Vest: \$4,725.00 plus an undivided 25% interest in the real property	
			Reviewed on: 12/22/15
			Updates:
			Recommendation:
			File 15- Ingram

16 Alissa Yanez, Jerimiah Yanez, Nicole Yanez, Case No. 15CEPR00589

Ariana Yanez, Savannah Yanez, Justin Yanez, Isaiah Yanez (GUARD/P)

Petitioner Valdez, Susan A. (Pro Per – Maternal Grandmother)

Petition for Appointment of Guardian of the Person Alissa and Jerimiah Only

Alissa Age: 3	<u>TEMPORARY EXPIRES 01/05/2016</u> SUSAN ANN VALDEZ, maternal grandmother, is petitioner. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: Note: Petition pertains only to Alissa D. Yanez & Jerimiah J. Yanez only. Minute Order of 11/10/2015: Examiner notes provided in open court; the father must be properly noticed. The following issues remain: 1. Need Notice of Hearing. 2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none">Justin Yanez (Father)	
Jerimiah Age: 6mos			
Cont. from 081115, 092915, 111015			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			x
Aff.Mail			n/a
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			x
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
Reviewed by: LV			
Reviewed on: 12/22/2015			
Updates:			
Recommendation:			
File 16 – Yanez			

DOD: 05/13/2015	TERENCE MILLER and JAMIE M. FLYNN,	NEEDS/PROBLEMS/COMMENTS:
	were appointed Co-Executors with full	
	IAEA without bond on 08/04/2015.	
	Letters issued on 08/04/2015.	
Cont. from	Minute Order of 08/04/2015 set this	<u>OFF CALENDAR.</u>
Aff.Sub.Wit.	Status Hearing for the filing of the	<u>Final Inventory and Appraisal</u>
Verified	Inventory and Appraisal.	<u>filed 12/23/2015.</u>
Inventory		1. Need Inventory and Appraisal or
PTC		current written status report
Not.Cred.		pursuant to Local Rule 7.5 which
Notice of Hrg		states in all matters set for status
Aff.Mail		hearing verified status reports
Aff.Pub.		must be filed no later than 10
Sp.Ntc.		days before the hearing. Status
Pers.Serv.		Reports must comply with the
Conf. Screen		applicable code requirements.
Letters		Notice of the status hearing,
Duties/Supp		together with a copy of the Status
Objections		Report shall be served on all
Video Receipt		necessary parties.
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 12/22/2015
UCCJEA		Updates: 12/23/2015
Citation		Recommendation:
FTB Notice		File 17- Schulte

Petitioner

Campbell, Phyllis Renee (pro per – maternal cousin)

Petition to Appoint Guardian of the Person

Age: 9		TEMPORARY EXPIRES 01/05/16		NEEDS/PROBLEMS/COMMENTS:	
		PHYLLIS CAMPBELL, maternal cousin, is Petitioner.		CONTINUED FROM 11/10/15 Minute Order from 11/10/15 states: The Court gives permission for additional service attempts of Scott Hobson, father, by mail. The Court's previous order that Thomas Carra not be allowed in the home or around the children remains in full force and effect.	
		Father: SCOTT HOBSON – served by mail on 12/19/15 – ok per 11/10/15 Minute Order			
		Mother: JOANNA ROWE – personally served on 07/20/15			
		Paternal grandfather: DECEASED Paternal grandmother: ANGEL HOBSON – served by mail on 09/30/15			
Cont. from 090115, 101315, 111015		Maternal grandfather: DECEASED Maternal grandmother: STACY THOMAS – served by mail on 09/30/15			
<input type="checkbox"/>	Aff.Sub.Wit.				
<input checked="" type="checkbox"/>	Verified				
<input type="checkbox"/>	Inventory				
<input type="checkbox"/>	PTC				
<input type="checkbox"/>	Not.Cred.				
<input checked="" type="checkbox"/>	Notice of Hrg				
<input checked="" type="checkbox"/>	Aff.Mail	w/			
<input type="checkbox"/>	Aff.Pub.				
<input type="checkbox"/>	Sp.Ntc.				
<input checked="" type="checkbox"/>	Pers.Serv.	w/			
<input checked="" type="checkbox"/>	Conf. Screen				
<input checked="" type="checkbox"/>	Letters				
<input checked="" type="checkbox"/>	Duties/Supp				
<input type="checkbox"/>	Objections				
<input type="checkbox"/>	Video Receipt				
<input checked="" type="checkbox"/>	CI Report				
<input type="checkbox"/>	9202				
<input checked="" type="checkbox"/>	Order				
<input type="checkbox"/>	Aff. Posting				
<input type="checkbox"/>	Status Rpt				
<input checked="" type="checkbox"/>	UCCJEA				
<input type="checkbox"/>	Citation				
<input type="checkbox"/>	FTB Notice				
		Sibling: ALEXIS LOPEZ – Consent & Waiver of Notice filed 07/02/15 Petitioner states [see file]. Court Investigator Samantha Henson filed a report on 08/26/15.			
				Reviewed by: JF	
				Reviewed on: 12/18/15	
				Updates: 12/23/15	
				Recommendation:	
				File 18 – Hobson	

19 **Janice Marie Amey (CONS/P)**
 Petitioner Dean, Yolanda (Pro Per – Daughter – Petitioner)
 Attorney LeVan, Nancy (Court appointed for Proposed Conservatee)

Case No. 15CEPR00813

Petition for Appointment of Probate Conservator of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 09/16/15 The following issue remains noted. 1. The Capacity Declarations do not support dementia medication powers as requested.
Cont. from 100515, 111715				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 12/22/15	
			Updates:	
			Recommendation:	
			File 19 – Amey	

Petitioner: Sarah Melcher (pro per)

Petition for Appointment of Guardian of the Person

			Temporary Expires 1/5/16.	NEEDS/PROBLEMS/COMMENTS:
			SARAH MELCHER, maternal grandmother, is petitioner.	
Cont. from 110315			Please see petition for details.	
	Aff.Sub.Wit.			
✓	Verified		Court Investigator Report filed on 10/27/15	
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W/		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	9202			
	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 12/18/15	
			Updates:	
			Recommendation:	
			File 20 – Luna	

21A Athena Rios, Bella Rios, Moses Rios (GUARD/P) Case No. 15CEPR00850

Attorney: Terri McCracken (for temporary guardians Ezequiel Suarez and Angelica Rios)

Attorney: Nellie R. Aguilar (for competing petitioner Jesus Valdivia)

Objector: Estevan Valdivia (pro per)

Petition for Appointment of Guardian of the Person

Athena age: 9	<u>TEMPORARY EXPIRES 01/05/2016</u> <u>Granted as to Ezequiel Suarez and Angelica Rios</u> EZEQUIEL SUAREZ and ANGELICA RIOS , maternal uncle and aunt, are petitioners. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: Note: 21B is a petition for guardianship filed by the paternal grandfather of Moses, Jesus Valdivia. Minute Order of 11/16/2015: Ms. Aguilar has not received the late filed Response. 1. There were three Notice of Hearings filed on 11/02/2015, all are defective as they do not include Petitioner's name at #1 and what petitioner filed. Therefore, service is defective and Examiner notes #2 and #3 still remain. 2. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Brandon Castillo (father) b. Estevan Valdivia (father) 3. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Paternal grandparents of Athena and Bella b. Jesus Valdivia (Moses's paternal grandfather) c. Agatha Valdivia (Moses's paternal grandmother) d. Hermino Rios (maternal grandfather) e. Gloria Padilla (Maternal grandmother)
Bella age: 8		
Moses age: 5		
Cont. from 110215, 111615		
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
✓ Notice of Hrg		
Aff.Mail	X	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	X	
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT (LV for 01/05/2015)
		Reviewed on: 12/23/2015
		Updates:
		Recommendation:
		File 21A – Rios

21A

21B Athena Rios, Bella Rios, Moses Rios (GUARD/P) Case No. 15CEPR00850

Attorney: Terri McCracken (for temporary guardians Ezequiel Suarez and Angelica Rios)

Attorney: Nellie R. Aguilar (for petitioner Jesus Valdivia – paternal grandfather)

Petition for Appointment of Guardian of the Person

Moses age: 5		<p align="center"><u>TEMPORARY EXPIRES 01/05/2016</u></p> <p align="center"><u>Granted as to Ezequiel Suarez and Angelica Rios</u></p> <p>JESUS VALDIVIA, paternal grandfather, is petitioner.</p> <p>Ezequiel Suarez and Angelica Rios were appointed temporary guardians on 09/10/2015. Served by mail on 11/04/2015.</p> <p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Petition is to Moses Rios only.</p> <p>Minute Order of 11/16/2015: Continued due to defects listed in the Examiner notes.</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			w/
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: LV</p> <p>Reviewed on: 12/23/2015</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 21B- Rios</p>		

21B

Petition to Determine Succession to Real Property

DOD: 01/19/02	DANIEL G. BARAJAS , son, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	40 days since DOD.	<u>OFF CALENDAR</u> Amended Petition filed 12/18/15 and set for hearing on 02/10/16
Cont. from 110315	No other proceedings.	
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$75,000.00	<ol style="list-style-type: none"> The Inventory & Appraisal filed 09/23/15 indicates that inventoried property represents a portion of the decedent's property at the time of death. Pursuant to Probate Code § 13152(a)(2) – to use this summary proceeding, the gross value of the decedent's real and personal property in this state cannot exceed \$150,000.00. Need more information regarding the other assets of decedent's estate to determine that the total value of the estate is \$150,000.00 or less. The petition is not marked at item 9(a)(7 or 8) regarding issue of a predeceased child. Need Notice of Hearing and proof of service by mail at least 15 days before the hearing of the Notice of Hearing on all interested parties. Need Order.
<input checked="" type="checkbox"/> Verified	Decedent died intestate.	
<input checked="" type="checkbox"/> Inventory	Petitioner requests Court determination that decedent's 100% interest in real property located at 1214 S. Hubert Avenue in Fresno pass to him pursuant to intestate succession.	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	x	
<input type="checkbox"/> Aff.Mail	x	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order	x	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 12/21/15
		Updates:
		Recommendation:
		File 22 – Barajas

Page 2

Petitioner requests that the provisions of the trust be modified to provide for long term trusts for the beneficiaries consistent with the intent of establishing the trust for the benefit of the children of Richard Timothy Bakman as follows:

- That the trustee shall distribute to or apply for the benefit of the beneficiary all of the net income of the beneficiary's trust at least annually.
- That until age 30, the trustee shall only distribute to or apply for the benefit of the beneficiary as much of the net income of the beneficiary's trust that the trustee, in his sole discretion, determines necessary or advisable.
- The trustee, other than the beneficiary if serving as trustee, may distribute as much of the principal of his trust as determined advisable for any purpose. If the beneficiary is the sole trustee, then the trustee shall distribute to or apply for the benefit of the beneficiary as much of the principal of the trust as the trustee determines is necessary.
- The beneficiary shall have unlimited and unrestricted testamentary general power to appoint all or any portion of the principal and undistributed income remaining in the beneficiary's trust at the beneficiary's death among our descendants and their spouses and the creditors of the beneficiary's estate; provided that any share for a spouse shall be in trust and shall only allow for income distributions to the spouse.
- See language re restrictions on appointment to creditors, tax matters.
- Insofar as any part of the beneficiary's trust shall not be effectively appointed, the trustee shall distribute the remaining unappointed balance in trust for the per capita at each generation in trusts to the descendants of the beneficiary. If no descendants, the trustee shall distribute to the descendants of **Richard Timothy Bakman and Penelope Marie Bakman**, to be administered under the same provisions as the beneficiary's trust.

Probate Code §15403 provides that unless continuance of the trust is necessary to carry out a material purpose of the trust, if all beneficiaries consent, they may compel modification upon petition to the court. All current beneficiaries of the separate trusts have concurrently herewith filed consents. Also concurrently filed herewith is an ex parte application to appoint **Penelope M. Bakman** as Guardian Ad Litem on behalf of the unborn and unascertained issue of Richard Timothy Bakman who might be entitled to distribution as contingent beneficiaries. Penelope M. Bakman, if so appointed, has also filed her consent to this petition to modify the trust.

Petitioner Richard Timothy Bakman states he and Penelope M. Bakman, as settlors, have established three separate irrevocable trusts for each of their children. The instant trust, if modified, would have the same dispositive provisions as the separate irrevocable trusts. To ease the administrative burden of having multiple similar trusts for the same beneficiaries, Petitioner requests that the separate share for each child under the living trust be merged into the respective separate irrevocable trust.

Probate Code §15411 states if the terms of two or more trusts are substantially similar, the court may combine the trusts if administration as a single trust will not defeat or substantially impair the accomplishment of the trust purposes or interests of the beneficiaries.

Petitioner states notice is required to be given to the children and unascertained issue of Petitioner Richard Timothy Bakman. (*Examiner's Note: No list is provided per §17201.*) Petitioner states although notice is not required, notice is also being given to the trustees of the separate irrevocable trusts.

Wherefore, Petitioner prays for an order:

- 1. Modifying the living trust as set forth above;**
- 2. Merging the Living Trust into the Irrevocable Trusts as set forth above; and**
- 3. For such other orders as the Court may deem proper.**

Ex Parte Petition for Appointment of Guardian Ad Litem

		RICHARD TIMOTHY BAKMAN , Second Successor Trustee and currently acting trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 12/1/15: Counsel</u> requests 30 days to obtain separate representation for this petition.	
Cont'd 120115		See petition for details.		
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc				
Reviewed on: 12/22/15				
Updates:				
Recommendation:				
File 24B - Bakman				

25 Emma Strickland, Gillian Strickland (GUARD/P) Case No. 15CEPR01039**Attorney Aguilar, Nellie R (for Janice Kasparian – maternal grandmother/Petitioner)****Petition for Appointment of Guardian of the Person**

Emma, 11	Temporary Dismissed on 11/03/2015 for non-appearance JANICE STRICKLAND , maternal grandmother, is Petitioner. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of personal service at least 15 court days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: A. John Strickland, Jr. (father) 3. Need proof of service at least 15 court days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: A. John Strickland (Paternal Grandfather) B. John Ford, III (Maternal Grandfather) C. John Strickland, III (Sibling, if over age 12)	
Gillian, 4			
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			x
Aff.Mail			x
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			x
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			

Reviewed by: LV
Reviewed on: 12/23/2015
Updates:
Recommendation:
File 25- Strickland

**Andrea Chavarria, Maria Espinoza,
Betzaida Delgado, Monica Rodriguez,
Yesenia Rodriguez, and Rene Balladares (GUARD/P)**

Case No. 15CEPR01044

Petitioner Munguia, Maribel (Pro Per – Maternal Grandmother – Petitioner)

Petition for Appointment of Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
			1. Need Notice of Hearing.
			2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on:
			- Andrea Chavarria (Minor)
			- Maria Espinoza (Minor)
			- Betzaida Delgado (Minor)
			- Claudia Delgado (Mother)
			- Oscar Chavarria (Father of Andrea)
			- Cruz Espinoza (Father of Maria)
			- Jorge Cuevas (Father of Betzaida)
			- Adolfo Rodriguez (Father of Monica and Yesenia)
			- Rene Balladares (Father of Rene)
			3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on:
			- Jose G. Delgado (Maternal Grandfather)
			- Israel Cavarria (Paternal Grandfather of Andrea)
			- Elvia Chavarria (Paternal Grandmother of Andrea)
			- Paternal Grandparents of Maria
			- Paternal Grandparents of Betzaida
			- Adolfo Rodriguez, Sr. (Paternal Grandfather of Monica and Yesenia)
			- Maria Aguirre (Paternal Grandmother of Monica and Yesenia)
			- Paternal Grandfather of Rene
			- Gloria Del Rosario Contreras (Paternal Grandmother of Rene)
			Reviewed by: skc
			Reviewed on: 12/22/15
			Updates:
			Recommendation:
			File 26- Chavarria, Espinoza, Delgado, Rodriguez, Balladares
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

27 Kamila Hammid, Saheim Hammid (GUARD/P) Case No. 15CEPR01047

Petitioner Brown, U. Anthony (Pro Per – Maternal Grandfather – Petitioner)
Petitioner Brown, Rosemary (Pro Per – Maternal Grandmother – Petitioner)
Mother Hammid, Nanyamka Hanifahisoke

Petition for Appointment of Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/ COMMENTS: <u>Note:</u> On 11/24/15, Nanyamka Hammid, Mother, filed a Notice of Change of Address with new residence information. 1. Need personal service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1511 on: - Quinton Johnson (Father) 2. Need service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Paternal Grandfather	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc				
Reviewed on: 12/22/15				
Updates:				
Recommendation:				
File 27- Hammid				

28 Jose Chavarria, Fabian Chavarria (GUARD/P)**Case No. 15CEPR01065**

Petitioner Chavarria, San Juanita Uresti (Pro Per – Paternal Aunt)

Petitioner Avila, Rodolfo Chavarria (Pro Per – Paternal Uncle)

Objection Avila, Manuel Chavarria (Pro Per – Father)

Petition for Appointment of Guardian of the Person (Initial)

Jose Age: 14		<p align="center"><u>NO TEMPORARY REQUESTED</u></p> <p>SAN JUANITA CHAVARRIA, paternal aunt, and RODOLFO CHAVARRIA AVILA, paternal uncle, are petitioners.</p> <p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Manuel Chavarria (Father) • Adriana Alvarez (Mother) • Jose Chavarria (Minor) • Fabian Chavarria (Minor) 3. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Maternal grandparents (Not Listed) • Siblings over age 12 	
Fabian Age: 16				
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			x
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
<p>Reviewed by: LV</p> <p>Reviewed on: 12/24/2015</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 28- Chavarria</p>				

Petition to Determine Succession to Real Property

DOD: 9/6/15		BLANCA GUERRERO , Spouse, is Petitioner. 40 days since DOD No other proceedings I&A: <i>need</i> Decedent died intestate Petitioner requests court determination that real property in Sanger and a vehicle pass to her.	NEEDS/PROBLEMS/COMMENTS: 1. Need Inventory and Appraisal pursuant to Probate Code §13152(b). 2. Need Attachment 11, which should contain a legal description of the real property and a description of the personal property, and should state what the decedent's interest was in the real and personal property. Did the decedent own everything 100% as his separate property? 3. Petitioner does not state what interest she is claiming in the real and personal property at #13. 4. Need Attachment 14, which should state the names, relationships, ages, and addresses of all heirs (spouse, children, etc.). 5. Petition is blank at #9a(7) and (8). Was the decedent survived by issue of a predeceased child? 6. Need clarification re #17: Was the decedent under a conservatorship at the time of his death? 7. Need Notice of Hearing and proof of service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §13153 on all persons named in Attachment 14. 8. This petition was filed with a fee waiver. If assets pass pursuant to this petition, all filing fees will be due. 9. Need order. Local Rule 7.1.1.F.	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			x
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg	x		
<input type="checkbox"/>	Aff.Mail	x		
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order	x		
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 12/23/15	
			Updates:	
			Recommendation:	
			File 29- Lamas	

Petition for Probate of Will and for Letters of Administration with Will Annexed; Authorization to Administer under IAEA

DOD: 9/29/15		ESPERANZA ALLEN , Granddaughter, is Petitioner and requests appointment as Administrator with Will Annexed with Full IAEA without bond.	NEEDS/PROBLEMS/COMMENTS:
<input type="checkbox"/>	Aff.Sub.Wit.	S/P	Named Executor Anthony Cantu is deceased.
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		Petitioner states Named Alternate Executor Alfredo Cantu declined to act.
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		Full IAEA – ok
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W	Will dated 1/7/05
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		Residence: Fresno Publication: Business Journal
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		Estimated value of estate: Personal property: \$ 78,000.00 Real property: \$230,000.00 Total: \$308,000.00
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp	X	Probate Referee: Steven Diebert
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		<p>1. Need original will pursuant to Probate Code §8200.</p> <p>2. Need Confidential Supplement to Duties and Liabilities of Personal Representative (DE-147S).</p> <p>3. Petitioner states at #3f that Named Alternate Executor Alfredo Cantu declined to act and that she is a nominee of a person entitled to Letters; however, no declination or nomination has been filed.</p> <p>Need declination to act from Alfredo Cantu and nomination from person entitled to Letters.</p> <p>4. It appears the list at #8 is incomplete – the box is checked re “continued on Attachment 8;” however, no attachment is provided. Need declaration containing a <u>complete</u> list.</p> <p>5. The will devises the estate to a trust; however, the list at #8 does not indicate whether any of the persons listed are trustees or beneficiaries of the trust. Need clarification.</p> <p>6. The Notice of Petition to Administer Estate was served only on those listed at #8. If that list is incomplete, need notice to the persons included on the attachment, if any.</p> <p>7. Need bond of \$308,000.00 or waivers of bond from all heirs.</p>
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed on: 12/23/15
			Updates:
			Recommendation:
			File 30- Navarrette

Note: If the petition is granted, status hearings will be set as follows:

- **Wednesday, February 24, 2016** at 9:00 a.m. in Department 303, for the filing of bond, if required.
- **Wednesday, April 6, 2016** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Wednesday, February 1, 2017** at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Petition for Probate of Will and for Letters of Administration with Will Annexed; Authorization to Administer under IAEA

DOD: 11/7/09		NOAH BULBULIAN , Grandson, is Petitioner and requests appointment as Administrator with Will Annexed with Full IAEA without bond.	NEEDS/PROBLEMS/COMMENTS: 1. Need publication per Probate Code §8120. 2. Need notice to the personal representative of the estate of post-deceased heir Gary N. Bulbulian per Probate Code §8110. 3. Need waivers of bond on mandatory Judicial Council Form DE-142 from: - Personal representative of Estate of Gary N. Bulbulian (Post-deceased heir) - Joshua Bulbulian - Zachary Bulbulian (The waivers filed 12/1/15 by Joshua and Zachary are not on the mandatory Judicial Council form which was adopted 1/1/15.) Alternatively, need bond of \$207,200.00.	
<input type="checkbox"/>	Aff.Sub.Wit.			S/P
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
		Named Executor Joshua Bulbulian declines to act and nominates petitioner. Named Alternate Executor Van Bulbulian is deceased. Full IAEA – Need publication Will dated 2/21/06 Residence: Parlier Publication: Need publication Estimated value of estate: Annual income: \$ 7,200.00 Real property: \$200,000.00 Total: \$207,200.00 Probate Referee: Steven Diebert		
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail		w	
<input type="checkbox"/>	Aff.Pub.		x	
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc Reviewed on: 12/23/15 Updates: Recommendation: File 31- Bulbulian	

Note: If the petition is granted, status hearings will be set as follows:

- **Wednesday, February 24, 2016** at 9:00 a.m. in Department 303, for the filing of bond, if required.
- **Wednesday, April 6, 2016** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Wednesday, February 1, 2017** at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

32 Illiana Manriquez (GUARD/P) Case No. 15CEPR00884

Petitioner Manriquez, Karen P. (Pro Per – Paternal Grandmother)

Petition for Appointment of Guardian of the Person

Age: 1	<u>TEMPORARY EXPIRES 11/16/15</u>	NEEDS/PROBLEMS/COMMENTS:
	KAREN P. MANRIQUEZ , Paternal Grandmother, is Petitioner.	Minute Order of 11/16/2015: Counsel represents that he will file a substitution form today. The matter is continued due to the notice issues. The Court orders that the Court Investigator be present in Court on 01/04/2015.
Cont. from 111615	<u>Please see petition for details</u>	1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none">• Paternal Grandfather (Not Listed)
<input type="checkbox"/> Aff.Sub.Wit.		As to Courtney D. Forker, Mother:
<input checked="" type="checkbox"/> Verified		1. Need proof of service regarding declaration filed on 09/21/2015 pursuant to Minute Order of 09/22/2015.
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 12/23/2015
		Updates:
		Recommendation:
		File 32- Manriquez